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PROGRAM MEMO

TO: Area Agencies on Aging

NO: PM 22-15

DATE ISSUED: August 1, 2022

EXPIRES: Until Superseded

PROGRAMS AFFECTED: Older Americans Act Programs (OAA) (Supportive Services - Title IIIB, Older Californians Nutrition Program - Title IIIC, Health Promotion - Title IIID, Family Caregiver Support Program - Title IIIE), Senior Community Service Employment Program -Title V (TV), Health Insurance Counseling and Advocacy Program - HICAP (HI), Long-term Care Ombudsman Program (LTCOP), and Fall Prevention (FP).

SUPERSEDES: N/A

SUBJECT: Older Adult Programs Equipment/Property Purchasing Process

PURPOSE

This Program Memo (PM) provides new guidance for Older Adult Programs equipment/property purchasing process.

BACKGROUND

Per [PM 20-05 Equipment/Property Justification and Reporting Threshold](#), the California Department of Aging (CDA) requires Area Agencies on Aging (AAA) to submit requests to purchase equipment and property items over \$5000 per unit cost as well as all vehicles, computing devices and portable electronic storage media regardless of cost. To standardize and expedite the equipment/property review and approval process, CDA has implemented a Program Equipment Analyst (PEA) position that will be a single point of contact to process the requests submitted to CDA by the AAAs. The new process establishes a step-by-step procedure and timeline for both CDA and the AAAs to follow to ensure timely response to equipment/property requests.

OLDER ADULT PROGRAMS EQUIPMENT /PROPERTY PURCHASING PROCEDURE

1. The AAA will list all equipment requests on applicable budget and send to the Local Finance Bureau (LFB) inbox Finance@aging.ca.gov for budget approval. Budget approval does not provide approval for equipment listed in the budget.
2. The PEA will reach out to the AAA within two business days of receiving approved budget from LFB.
3. The PEA will send [CDA 7037 Equipment Justification Form](#) to AAA. The AAA is expected to complete and return this form to the PEA inbox, CDAEquipment@aging.ca.gov, within 10 business days of receiving.

- If AAA is requesting equipment from the CDA Program Equipment Approved list such as the [CDA 7038 Title IIIC Capital Expenditure Approved List](#), a CDA 7037 will not be needed. PEA will provide AAA with [CDA 9023 Property Acquisition Form](#). (Note: More CDA Program Expenditure Approved lists will be available soon.)
4. Once the PEA has received the completed CDA 7037, PEA will notify the AAA that their request/justification is approved.
 5. The PEA will send CDA 9023 to AAA. AAA is expected to complete and return this form back to the PEA inbox, CDAEquipment@aging.ca.gov, within 5 business days of purchasing equipment.
 6. Once CDA 9023 is completed correctly and returned to the CDAEquipment@aging.ca.gov inbox, PEA will notify AAA and Business Management Branch (BMB) of the approval and BMB will process the CDA 9023.
 7. BMB will notify the PEA and AAA once CDA 9023 is completed.

If the AAA's equipment is not approved, PEA will notify AAA and LFB of the denial. AAA will have the option to submit a revised budget to LFB, removing the funding for equipment. If an amendment is upcoming, the AAA can opt to remove the equipment costs during the amendment budget process.

Click here for a webinar walk through of the new process: <https://youtu.be/QW-PoPxHlzl>

INQUIRIES

For questions regarding this PM, please email: Lana.Reynolds@aging.ca.gov

/S/

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